OAISYS Administrator

User Manual

Version 1.0

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Computer Telephony Solutions, Inc.

OAISYS Net Phone is a copyrighted application developed exclusively by Computer Telephony Solutions, Inc. Our headquarters are in Phoenix, Arizona, and you can learn more about the company and other exciting applications by visiting our web site at www.oaisys.com

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OAISYS Administrator User's Guide

Overview

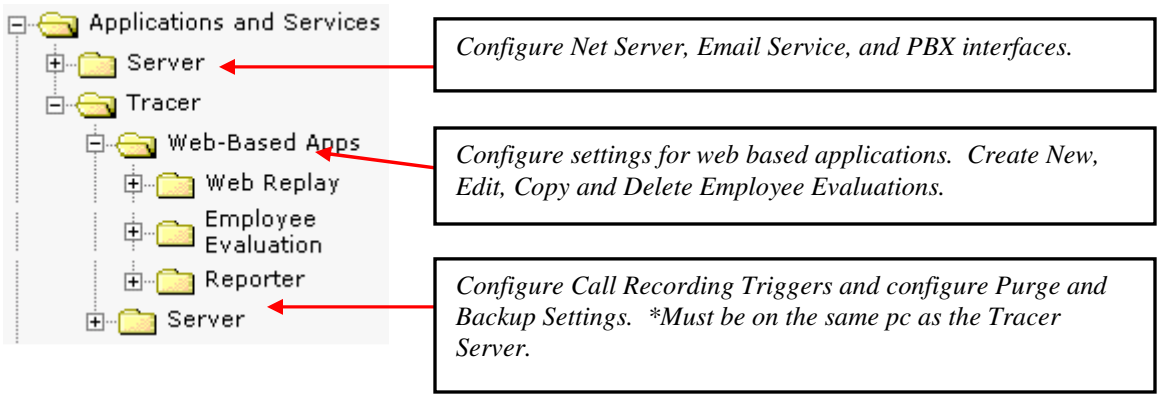
The OAISYS Administrator is used for centralized class of service administration of OAISYS applications. This browser based application can be used remotely however access to some settings will not be available.

There are three major areas for setup and configuration:

- **Applications and Services**

  Server--Configure settings for the OAISYS Net Server and OAISYS Tracer. If the browser that the Administrator is running on resides on the same pc as the OAISYS Net Server you can access and configure settings for the Net Server, Email Service, and the PBX Interfaces.

  Tracer—There are three web based applications for the OAISYS Tracer; Web Replay, Reporter, and Employee Evaluation. From this option in the tree you can configure settings for these web based applications. Under the Web Replay you can configure the Outside Number Link and Call Data Columns. From Reporter you can configure Automatic Reports and Programmable Links. From Employee Evaluation you can create new Employee Evaluations forms. You can edit, copy and delete the Employee Evaluations from this view. Under the Tracer Server folder you can access Call Recording Triggers and configure Purge and Backup Settings. This requires that the Administrator be running on the same pc as the OAISYS Tracer.

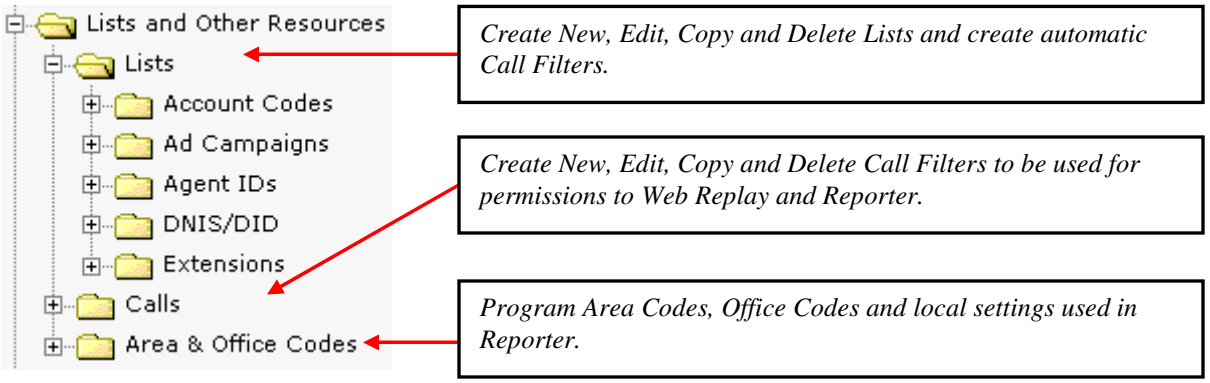

Applications and Services
Server
Tracer
Web-Based Apps
Web Replay
Employee Evaluation
Reporter
Server
Configure Net Server, Email Service, and PBX interfaces.
Configure settings for web based applications. Create New, Edit, Copy and Delete Employee Evaluations.
Configure Call Recording Triggers and configure Purge and Backup Settings. *Must be on the same pc as the Tracer Server.

- **Lists and Other Resources**

  Lists—Create New, Edit, Copy, and Delete lists. There are five different types of lists that Tracer's Web Based applications can use; Account Codes, Ad Campaigns, Agent Ids, DNIS/DID, and Extensions.

  Call Filters—Call Filters are used when determining what calls a user can listen to or view in Web Replay and what calls someone can review in Reporter. For example, you may have a user at extension 1235 named Rob. Rob is only allowed to listen to recordings in Web Replay that have an account code on them. You can use a Call Filter to allow Rob permission to listen to these calls, but not others.

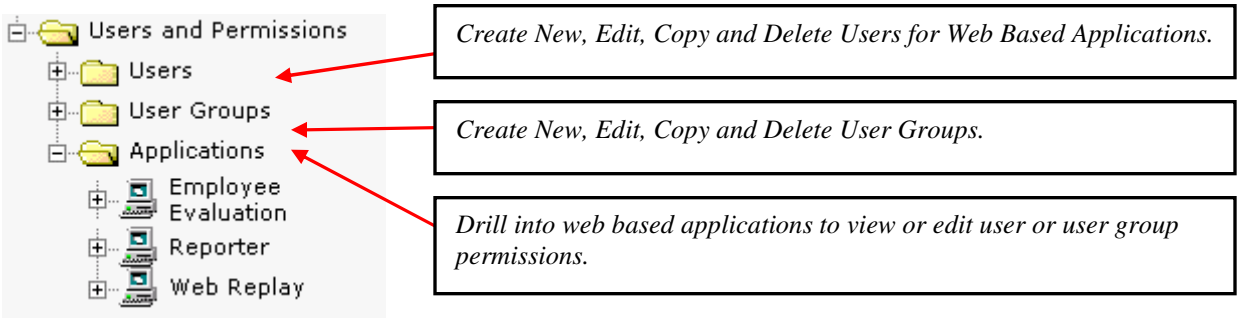
  Area and Office Codes—Program Area Codes, Office Codes, Local Area Code used in reports.


Lists and Other Resources
Lists
Account Codes
Ad Campaigns
Agent IDs
DNIS/DID
Extensions
Calls
Area & Office Codes
Create New, Edit, Copy and Delete Lists and create automatic Call Filters.
Create New, Edit, Copy and Delete Call Filters to be used for permissions to Web Replay and Reporter.
Program Area Codes, Office Codes and local settings used in Reporter.

- **Users and Permissions**

  Program Users, User Groups, and Permissions for the OAISYS web based applications. A user can have access to Web Replay, the Agent Evaluation, and or Reporter. A user can be assigned to a user group. You can assign permissions to a group of users in which case all users of that group inherit the permissions set for the group. An administrator can override these permissions on a user by user basis. From the Applications folder you can drill into Web Replay, Agent Evaluation, or Reporter to see what user groups and what users have permissions to the applications.

  - Agent Evaluation—Apply Self Evaluation Permissions and Supervisor Evaluation Permissions. Specify which evaluations a user or group can access.
  - Reporter—Allow or Deny a user or group permissions to report on their own calls, all calls, or calls that fall under a Call Filter.
  - Web Replay—Allow or Deny a user or user group permission to view or modify call data, bookmarks, and recordings that are their own calls, all calls, or calls that fall under a Call Filter.

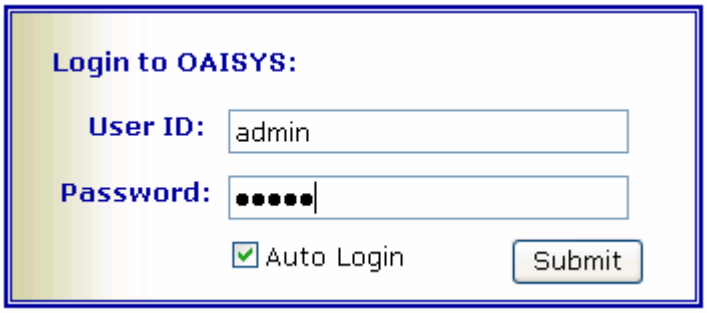

Users and Permissions
Users
User Groups
Applications
Employee Evaluation
Reporter
Web Replay
Create New, Edit, Copy and Delete Users for Web Based Applications.
Create New, Edit, Copy and Delete User Groups.
Drill into web based applications to view or edit user or user group permissions.

Login to the OAISYS Administrator

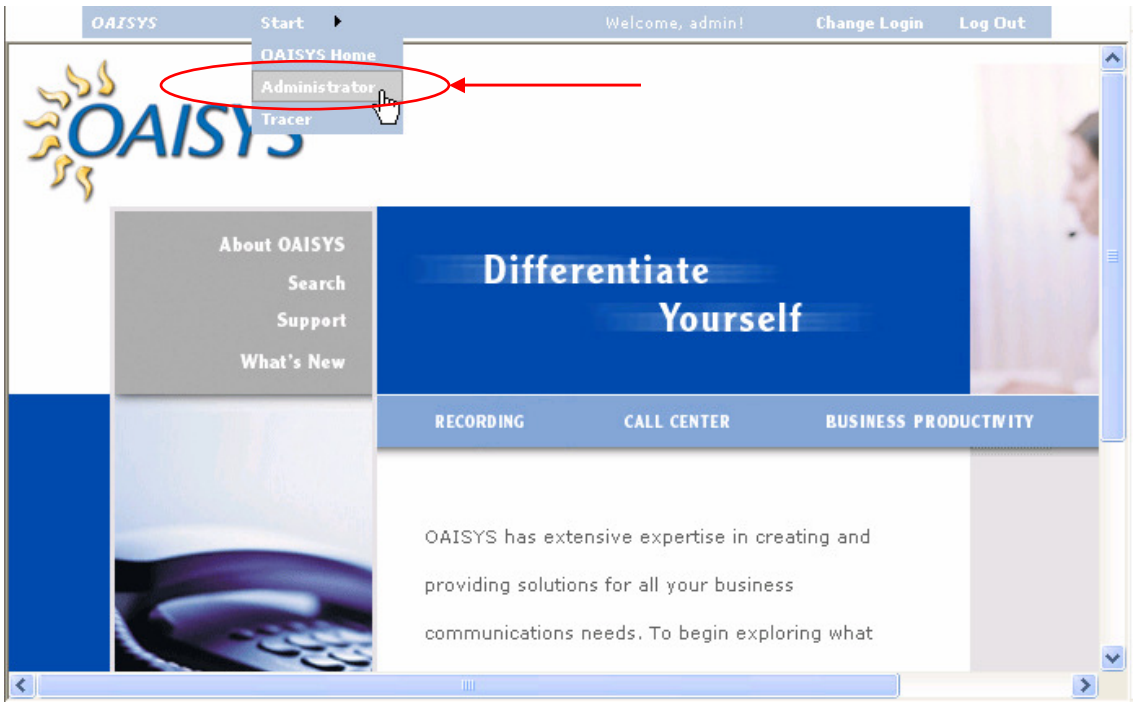
The first time you connect to the login page, your browser should prompt you to download our encryption active-X control. This download has to succeed before you can log in.

Steps to log in:

- Point your browser to the designated OAISYS Tracer URL.
- Click on Login and enter your Login and Password.
- Select Auto Login if you'd like the OAISYS Administrator to remember your username and password the next time you login from this computer.
- Click on the Submit button.



- Go to Start > Administrator



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Applications and Services

The Applications and Services section allows you to configure OAISYS Net Server and OAISYS Tracer settings.

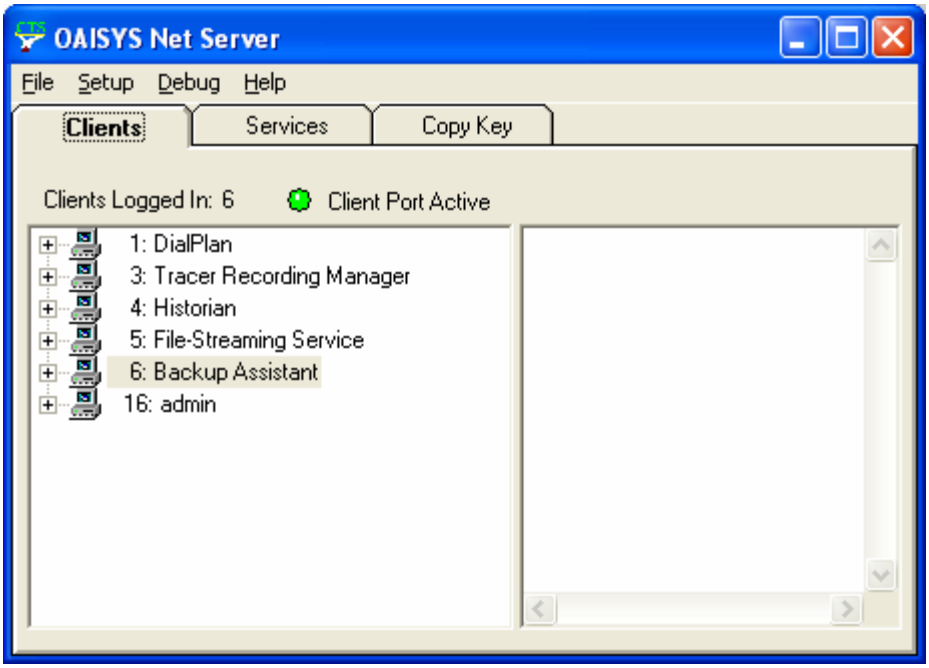
Server

Net Server

This page launches *OAISYS Net Server*, which is a separate executable that "pops up" when this page gets loaded. In order for *Net Server* to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where *Net Server* resides.
(d) The Net-Server database must support a login with your same username and password.

Net Server will launch right away; if it does not, then one, or more, of the above conditions is not met.



Email

This page launches ***Email Assistant***, which is a separate executable that "pops up" when this page gets loaded. In order for ***Email Assistant*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***Email Assistant*** resides.
(d) The Net-Server database must support a login with your same username and password.

Email Assistant will launch right away; if it does not, then one, or more, of the above conditions is not met.

PBX Interfaces

CTI

This page launches ***Level2-CTI Service***, which is a separate executable that "pops up" when this page gets loaded. In order for ***Level2*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***Level2*** resides.
(d) The Net-Server database must support a login with your same username and password.

Level2 will launch right away; if it does not, then one, or more, of the above conditions is not met.

SMDR

This page launches ***SMDR Service***, which is a separate executable that "pops up" when this page gets loaded. In order for ***SMDR*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***SMDR*** resides.
(d) The Net-Server database must support a login with your same username and password.

SMDR will launch right away; if it does not, then one, or more, of the above conditions is not met.

Tracer

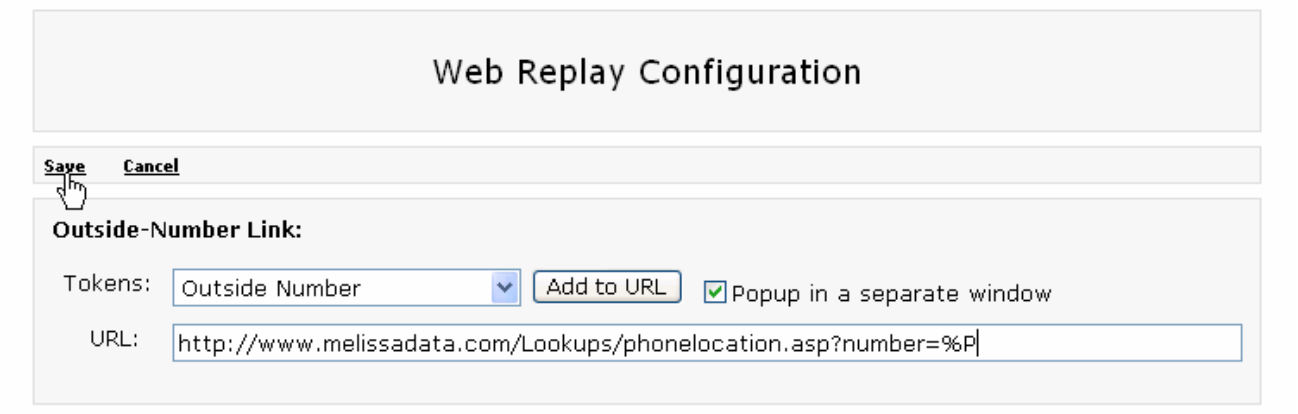
Configure your OAISYS Tracer's web based applications and server components.

Web Based Apps

Web Replay

Outside Number Link

Use this section to program a URL for reverse number look ups from the Web Replay. Select a Token from the drop down list. Check the Popup in a separate window box if you'd like the URL to be displayed in a separate window from the Web Reply. Enter the URL you wish to link to.



Call Columns

The Call Columns define what columns are displayed in Web Replay. System data columns such as Start Date/Time and Outside Number are examples of Call Columns that appear in Web Replay. System columns are indicated with brackets around the column name. User Defined columns are defined here too. User Defined columns can be added, copied, edited or deleted from the Action menu.

Create a new Call Column

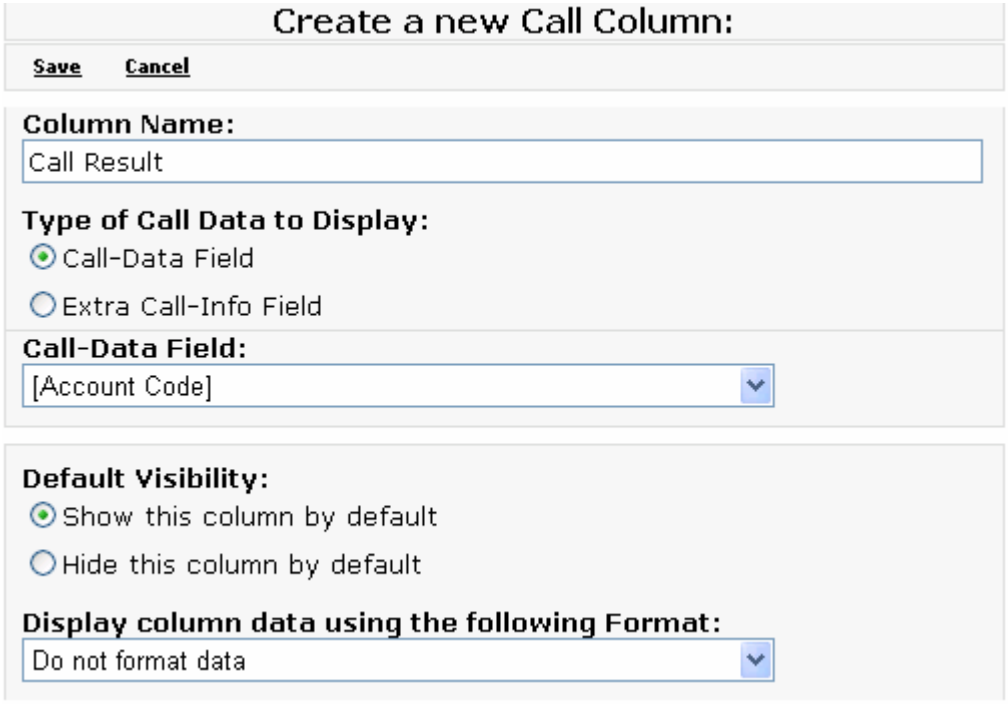
Column Name—This is the name displayed as a column header in Web Replay.

Type of Call Data to Display—Select the radio button to indicate if the Call Data is a Call-Data field or an Extra Call-Info Field. Call-Data Fields are not part of an actual call, but rather a recording. Extra Call-Info Fields can be associated with a call and entered by another application during the call itself.

Call-Data Field or Extra-Info Field—Select from the available Call-Data Fields or Extra-Info Fields. (These are defined in the Calls Folder under Lists and Other Resources.)

Default Visibility—Indicate whether you'd like to Show or Hide the column by default in Web Replay.

Display column data using the following Format—Select how you'd like the data to display in the column in Web Replay.

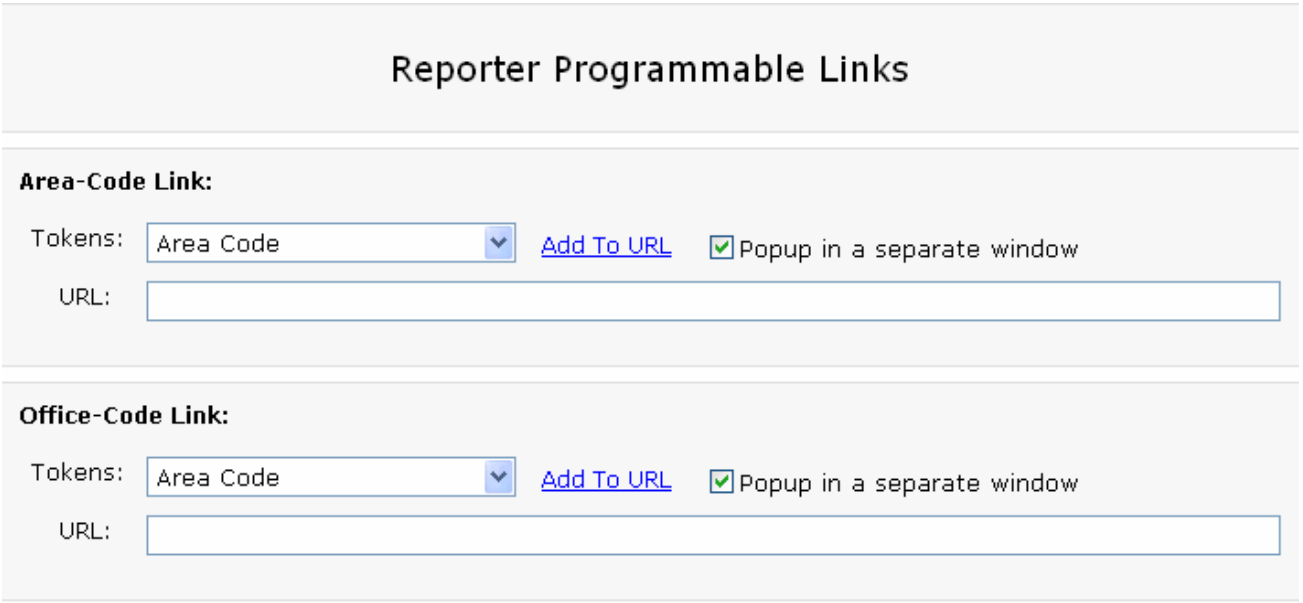


Reporter

Automatic Reports

Under Development

Programmable Links



Employee Evaluation

Employee Evaluation provides a method where questions can be presented and the ability to record a grade or rating for each question is provided. The Employee Evaluation system can be used for several purposes. It can be used by employees as a self learning tool by having employees listen to their own calls and evaluate their own work performances. Management can use the Employee Evaluation to evaluate their employees' performances and effectiveness. It can also be used to determine what additional training may be needed for employees. The Employee Evaluation records test criteria for Self, Supervisor, or Self and Supervisor.

Action

New –Create a new Employee Evaluation Type.

Description—Enter a general description for your employee evaluation.

# of Questions—Select the number of questions for your agent evaluation from the drop down list.

Graders—Select the radio button to indicate who the grader for this employee evaluation will be.

Employees—These are the employees whom are going to be evaluated. This drop down is populated with the extension lists that have previously been created. (Please see the section on Lists and other Resources for more information.)

Evaluate Employees on these Calls—These are the calls you'd like the employees to be evaluated on. Use the double arrows to select calls from the call list. Select [All Calls] if you'd like to evaluate all of the employees' calls. For more information on Call Lists refer to the section on Lists and Other Resources.

Questions—The Questions will be populated based on the number of questions you selected from the drop down above.

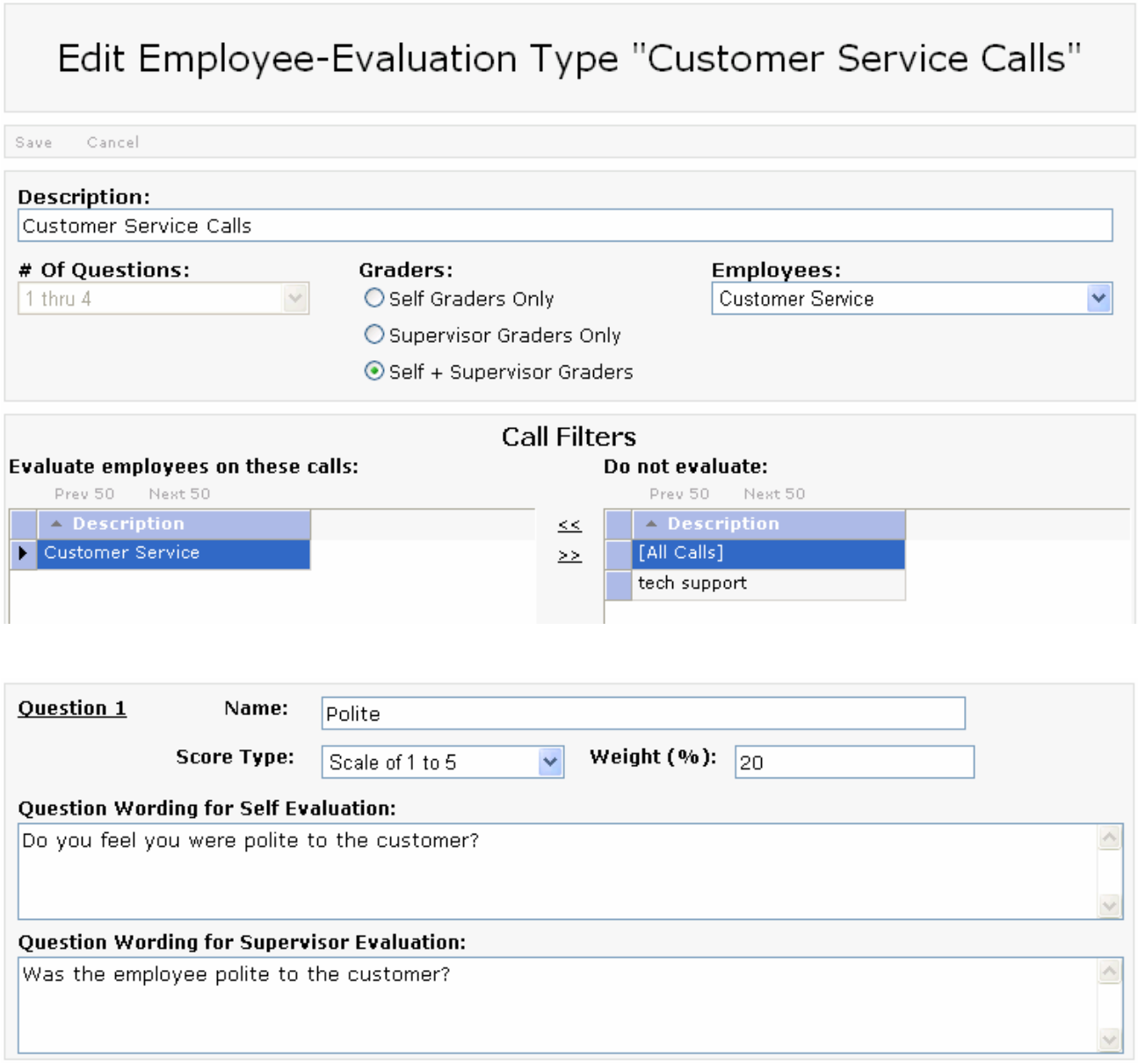
Name—Enter a descriptive name for the question.

Score Type—Select the type of grading you would like for this question. The choices are Scale of 1 to 5 or Yes/No.

Weight (%)—Enter the weight in a percentage that you'd like this question to have. Keep in mind that the weight for all questions totaled must equal 100%.

Question Wording for Self Evaluation—Enter the question exactly as you'd like the agent to see it. Note: this option appears only when Self or Self + Supervisor Evaluators were selected from the Evaluators section.

Question Wording for Supervisor Evaluation—Enter the question exactly as you'd like the supervisor to see it. Note: this option appears only when Supervisor or Self + Supervisor Evaluators were selected from the Evaluators section.


Edit Employee-Evaluation Type "Customer Service Calls"
Save
Cancel
Description:
Customer Service Calls
Of Questions:
1 thru 4
Graders:
Self Graders Only
Supervisor Graders Only
Self + Supervisor Graders
Employees:
Customer Service
Call Filters
Evaluate employees on these calls:
Prev 50
Next 50
Description
Customer Service
<<
>>
Do not evaluate:
Prev 50
Next 50
Description
[All Calls]
tech support
Question 1
Name:
Polite
Score Type:
Scale of 1 to 5
Weight (%):
20
Question Wording for Self Evaluation:
Do you feel you were polite to the customer?
Question Wording for Supervisor Evaluation:
Was the employee polite to the customer?

Copy—Copy the highlighted Employee Evaluation. Make changes as necessary and Save.

Edit --Make changes to the exiting Employee Evaluation.

Delete—Delete the Employee Evaluation.

Server

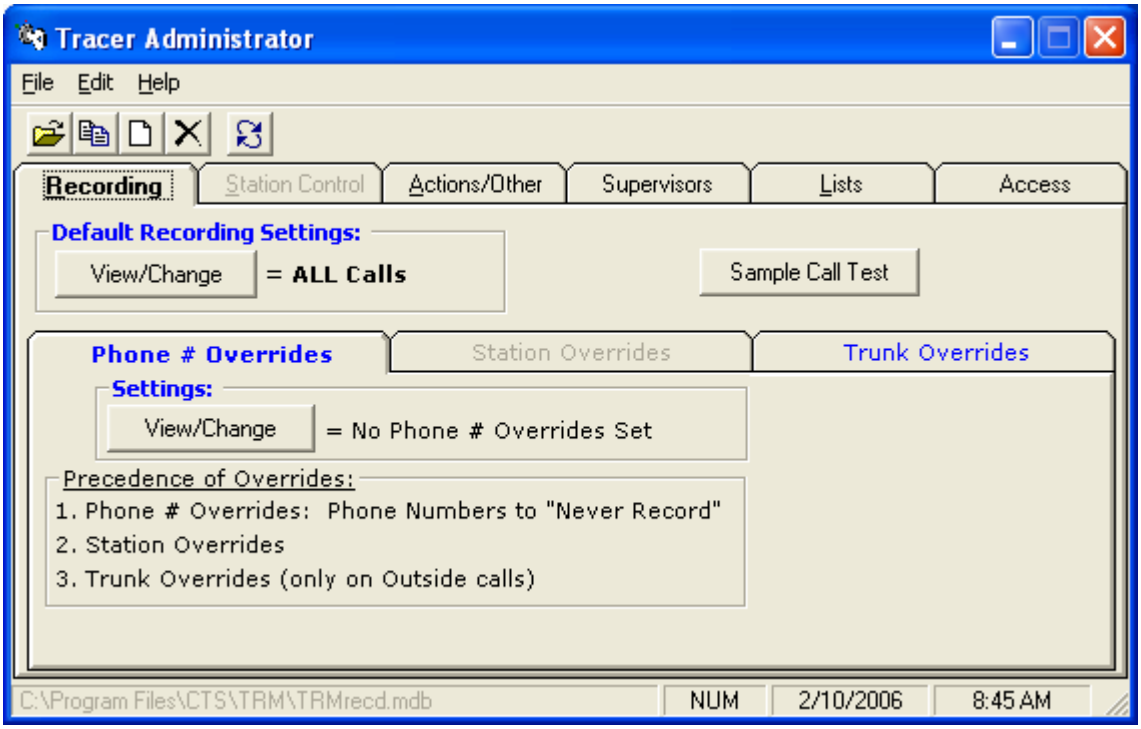
Configure settings within the Tracer Administrator. The browser must reside on the same server machine where the Tracer components reside.

Call Recording Triggers

This page launches ***TRM (Tracer Recording Manager) Admin***, which is a separate executable that "pops up" when this page gets loaded. In order for ***TRM Admin*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***TRM Admin*** resides.
(d) The Net-Server database must support a login with your same username and password.

TRM Admin will launch right away; if it does not, then one, or more, of the above conditions is not met.



For more information on configuring Call Recording Triggers please refer to the Tracer System Administrator's Guide.

Alarm Handling

This page launches ***TRM (Tracer Recording Manager) Admin***, which is a separate executable that "pops up" when this page gets loaded. In order for ***TRM Admin*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***TRM Admin*** resides.
(d) The Net-Server database must support a login with your same username and password.

TRM Admin will launch right away; if it does not, then one, or more, of the above conditions is not met.

For more information on configuring Alarms please refer to the Tracer System Administrator's Guide.

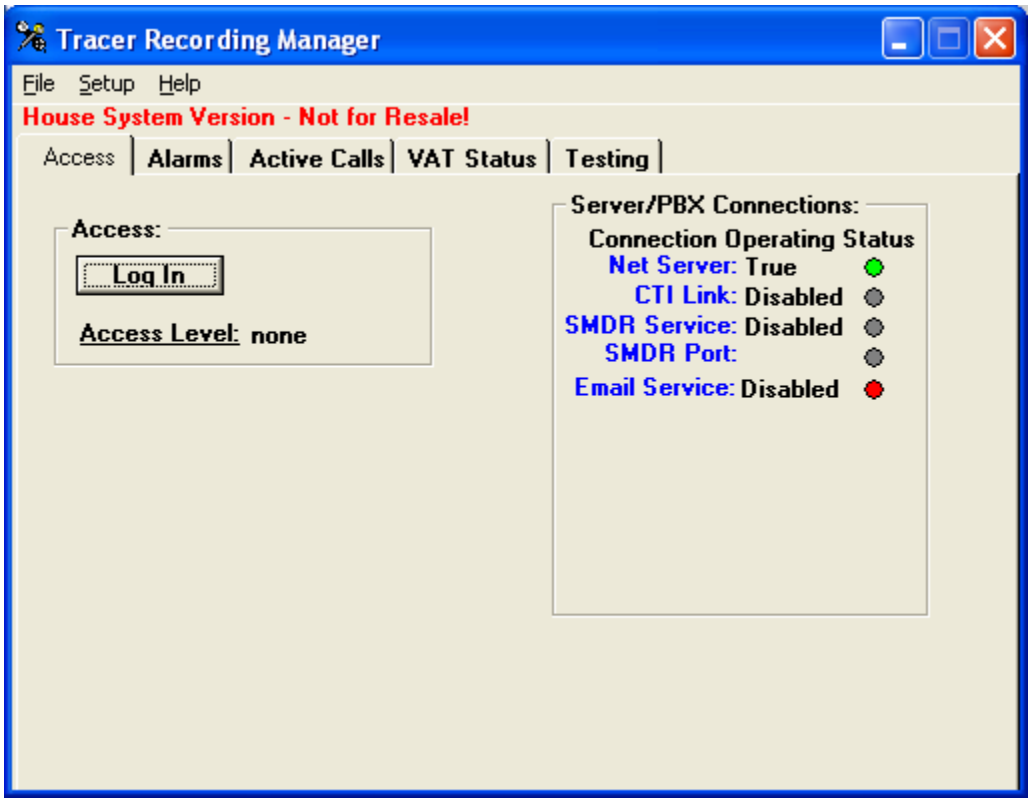
Alarm History

This page launches ***TRM (Tracer Recording Manager)***, which is a separate executable that "pops up" when this page gets loaded. In order for ***TRM*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***TRM*** resides.
(d) The Net-Server database must support a login with your same username and password.

TRM will launch right away; if it does not, then one, or more, of the above conditions is not met.

For more information on configuring Call Recording Triggers please refer to the Tracer System Administrator's Guide.



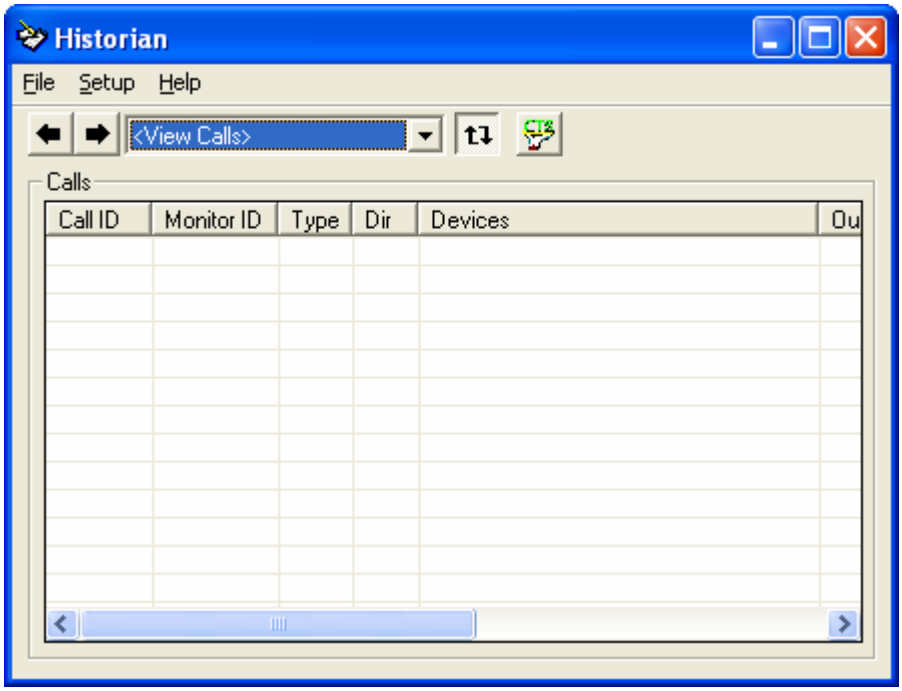
Purge Settings

This page launches ***Historian***, which is a separate executable that "pops up" when this page gets loaded. In order for ***Historian*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***Historian*** resides.
(d) The Net-Server database must support a login with your same username and password.

Historian will launch right away; if it does not, then one, or more, of the above conditions is not met.

For more information on Purge settings please refer to the Tracer System Administrator's Guide.



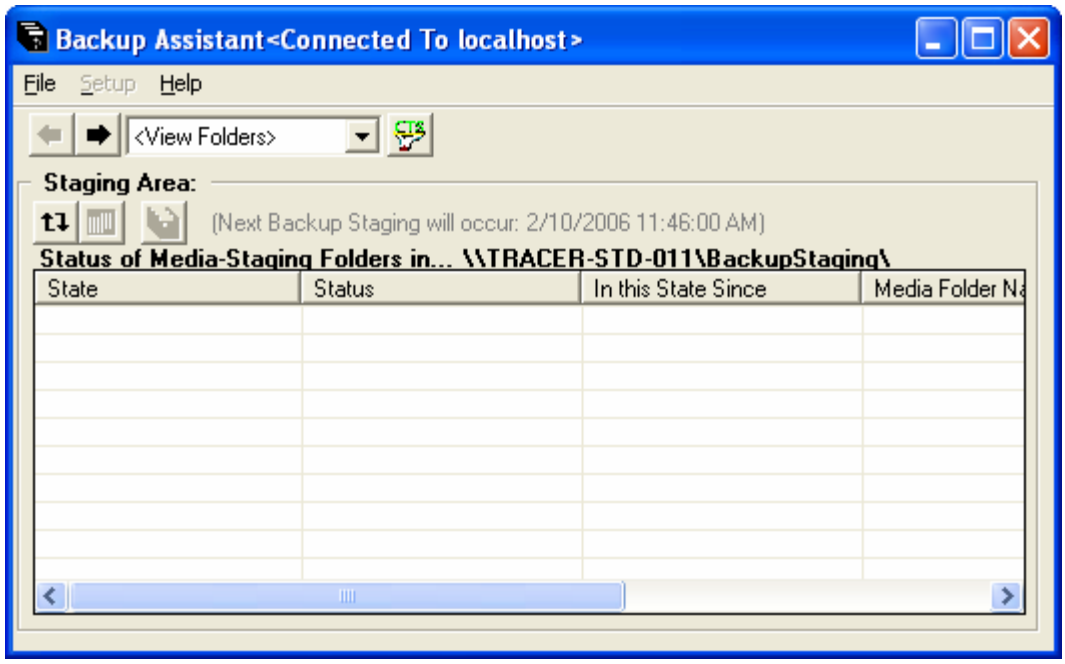
Backup Settings

This page launches ***Backup Assistant***, which is a separate executable that "pops up" when this page gets loaded. In order for ***Backup Assistant*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***Backup Assistant*** resides.
(d) The Net-Server database must support a login with your same username and password.

Backup Assistant will launch right away; if it does not, then one, or more, of the above conditions is not met.

For more information on configuring backup settings please refer to the Tracer System Administrator's Guide.



Recording Ports

This page launches ***VAT (Voice Assistant Tracer)***, which is a separate executable that "pops up" when this page gets loaded. In order for ***VAT*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***VAT*** resides.
(d) The Net-Server database must support a login with your same username and password.

VAT will launch right away; if it does not, then one, or more, of the above conditions is not met.

For more information on configuring Voice Assistant Tracer please refer to the Tracer System Administrator's Guide.

Email

This page launches ***Email Assistant***, which is a separate executable that "pops up" when this page gets loaded. In order for ***Email Assistant*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***Email Assistant*** resides.
(d) The Net-Server database must support a login with your same username and password.

Email Assistant will launch right away; if it does not, then one, or more, of the above conditions is not met.

For more information on configuring the Email Assistant please refer to the Tracer System Administrator's Guide.

PBX Interfaces

CTI

This page launches ***Level2-CTI Service***, which is a separate executable that "pops up" when this page gets loaded. In order for ***Level2*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***Level2*** resides.
(d) The Net-Server database must support a login with your same username and password.

Level2 will launch right away; if it does not, then one, or more, of the above conditions is not met.

SMDR

This page launches ***SMDR Service***, which is a separate executable that "pops up" when this page gets loaded. In order for ***SMDR*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***SMDR*** resides.
(d) The Net-Server database must support a login with your same username and password.

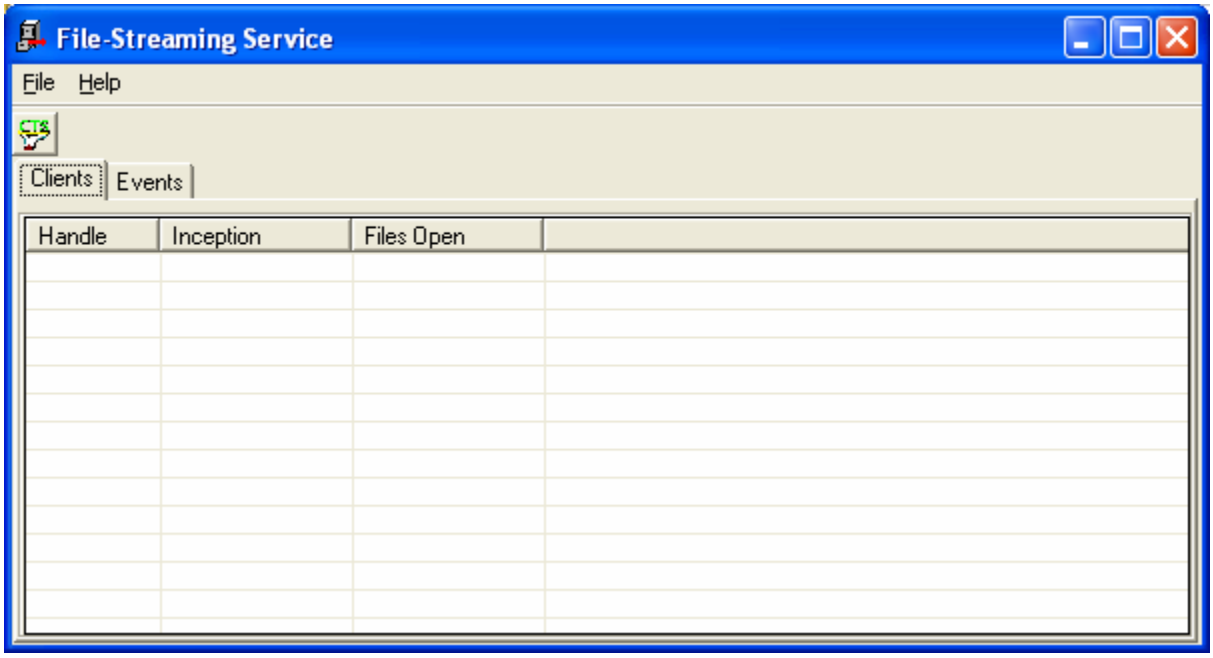
SMDR will launch right away; if it does not, then one, or more, of the above conditions is not met.

File Streaming

This page launches ***FSS (File-Streaming Service)***, which is a separate executable that "pops up" when this page gets loaded. In order for ***FSS*** to launch correctly, the following must all be true:

(a) The browser must support active-X controls.
(b) The browser must support client-side scripting.
(c) The browser must reside on the same server machine where ***FSS*** resides.
(d) The Net-Server database must support a login with your same username and password.

FSS will launch right away; if it does not, then one, or more, of the above conditions is not met.



Lists and Other Resources

This section is used to setup Lists, Call Filters, Call Data Fields, Extra-Info Fields, and Area Codes. The lists and call filters created here are used to populate drop downs in several other places within the OAISYS Administrator. The area codes are used for reports.

System Lists are indicated by Brackets appearing around the name. For example [All Account Codes] represents a system list of all of the account codes in the system. This list can not be edited or deleted.

Lists

There are five different types of lists that can be created; Account Code Lists, Ad Campaign Lists, Agent ID Lists, DNIS/DID Lists, and Extension Lists.

Account Codes

Account Code Lists are used in the OAISYS Reporter and Web Replay to allow users to report on and view or listen to calls that have specific account codes associated with them.

Create Account Codes to be used in your Account Codes List by highlighting one of the Account Code Lists from the tree view on the left.

Action

New—Create a new account code.

Account Code—Enter your account code here. This field must be a unique numeric account code.

Description—Enter a name for your account code.

Edit—Edit an existing account code by selecting the account code and clicking edit.

Copy--Copy an existing account code by highlighting the account code and clicking Copy. You must make a change in order to save the new account code.

Delete—Highlight the account code you wish to delete and click delete.

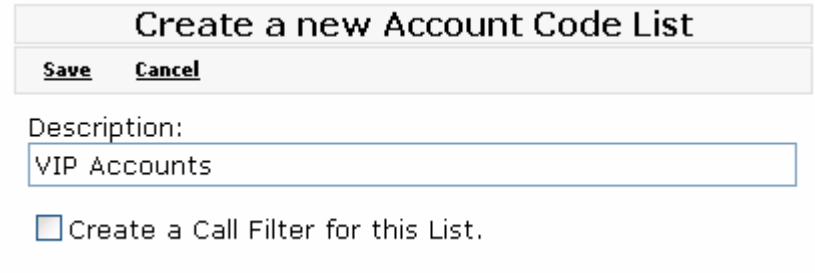
Account Codes List

Highlight the Account Codes Root from the tree diagram on the left.

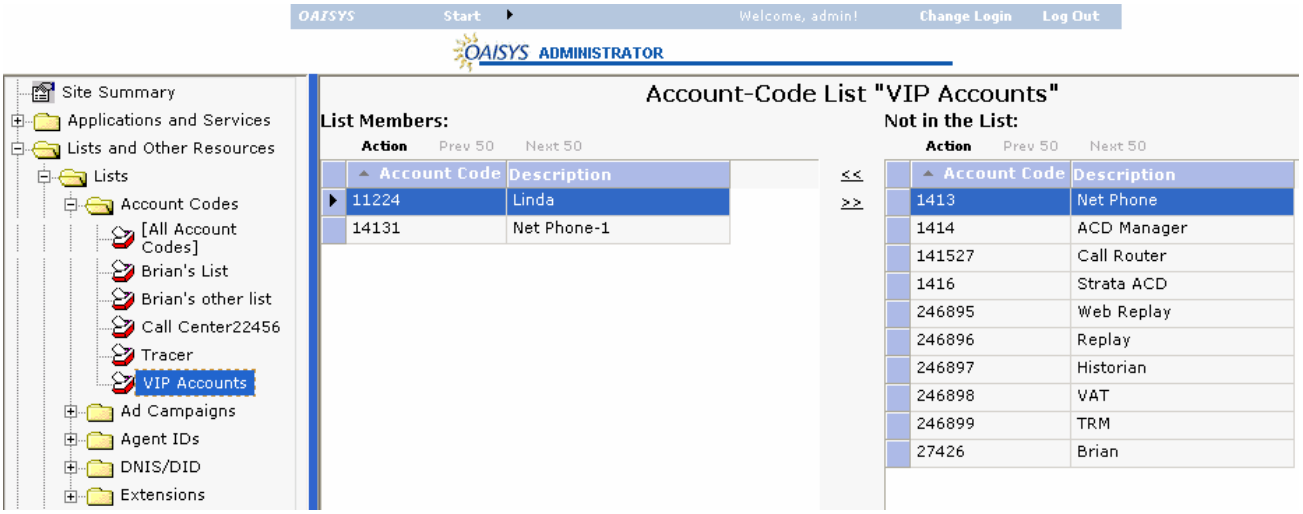
Action

New—Create New Account Code List here.
Description—Enter a name for your account code list.
Create a Call Filter for the List—Create a call filter based on this account code list.

Select the account codes you'd like to be members of the list by using the double arrows to move account codes to and from the list.



Once you've created a new Account Code List you'll need to add account codes to the list. Highlight your new Account Code List on the left. Use the double arrows to move account codes to and from your account code list.



Note: You can select Action from this window. You can select New, Copy, Edit and Delete from the List Members. By selecting New, you can create a new account code. You can edit an existing account code, copy or delete an account code from here.

Ad Campaigns

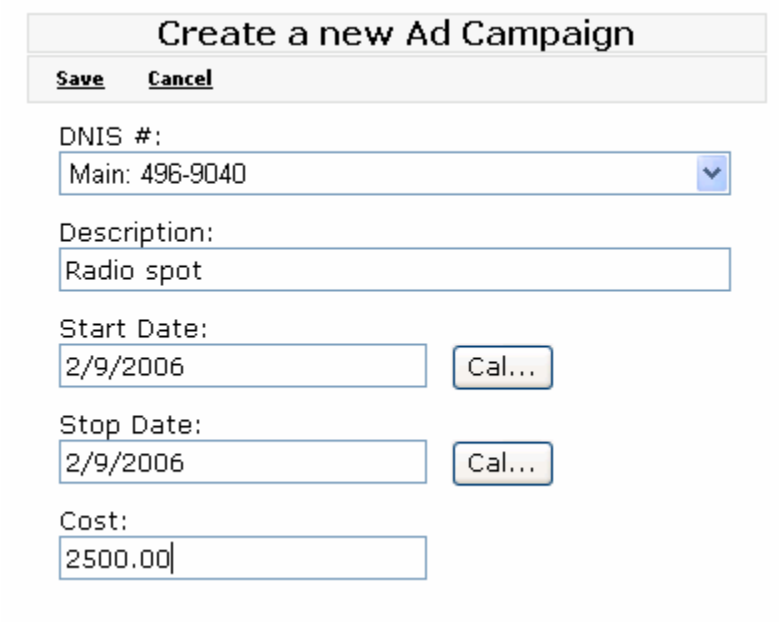
Ad Campaigns are used in OAISYS Reporter to provide information to the user about their various ad campaigns. For example, a user may want to find out how valuable their Radio Ad Campaign has been over the past six months compared to their Infomercial Campaign. In order for the OAISYS Reporter to generate valuable reports on ad campaigns the campaign information must be programmed here in the OAISYS Administrator. In order to create an Ad Campaign List you must first create Ad Campaigns.

Create a new Ad Campaign:

Highlight [All Ad Campaigns]

Action

New



DNIS#--Select a DNIS Number from the drop down list.

Description—Enter a meaningful description for the Ad Campaign.

Start Date—Enter the date the campaign started.

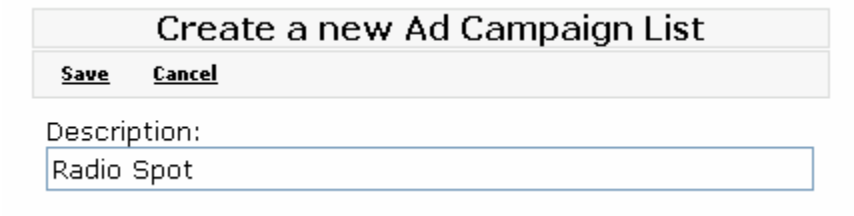
Stop Date—Enter the date the campaign ended.

Cost—Enter the cost of the ad campaign.

Create an Ad Campaign List

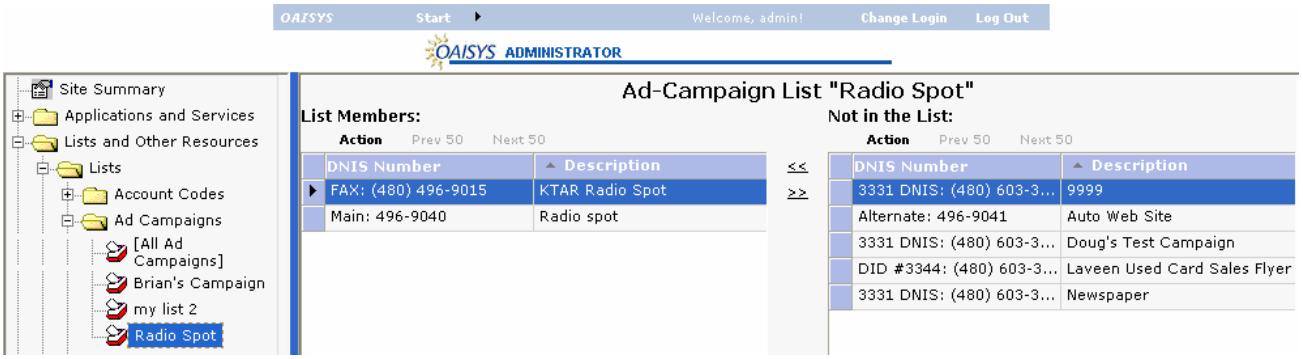
Action

New



Enter a Description for your Ad Campaign. Click on Save.

Move Members to and from your Ad Campaign list using the double arrows.

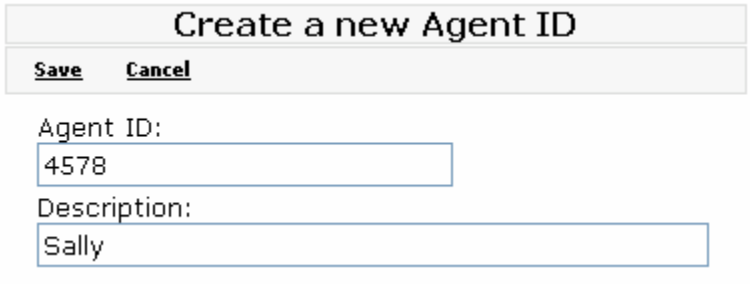


Note: New, Copy, Edit and Delete are available from this view.

Agent Ids

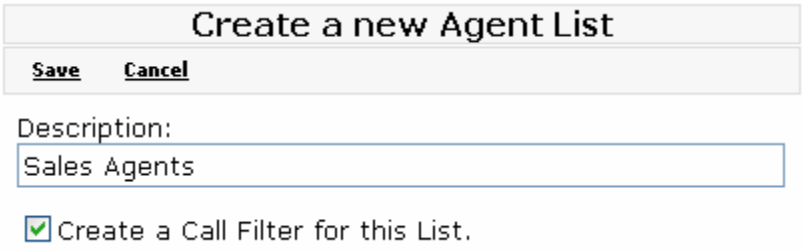
Agent IDs are used in the OAISYS Reporter and in Web Replay to allow users to report on, view or listen to recordings associated with Agent IDs.
Create Agent Lists as well as individual agents in this section.

Create a New Agent
Action : New.



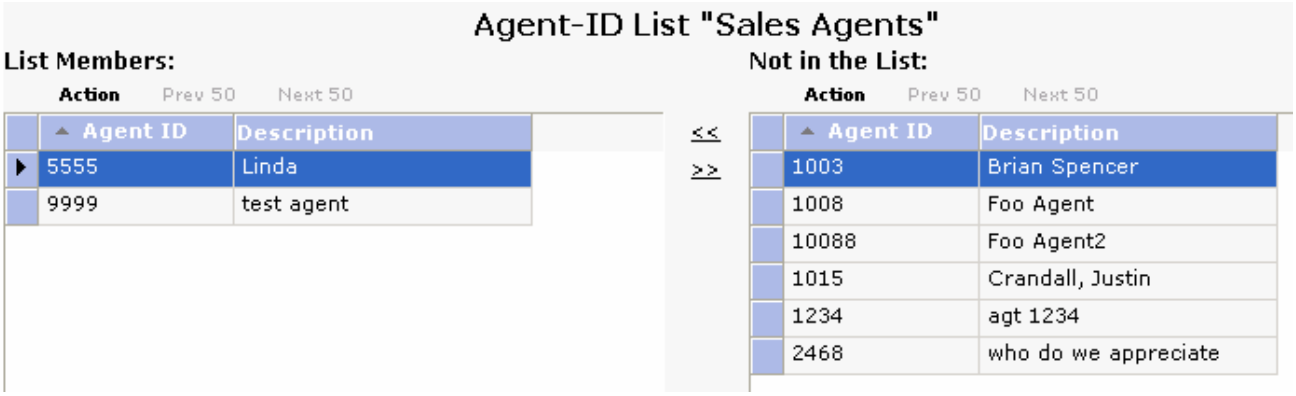
Create an Agent ID List
Action

New



Create a Call Filter for this List—automatically create a Call Filter consisting of Agent IDs on this list.

Move agents to and from the Agent ID List using the arrows.



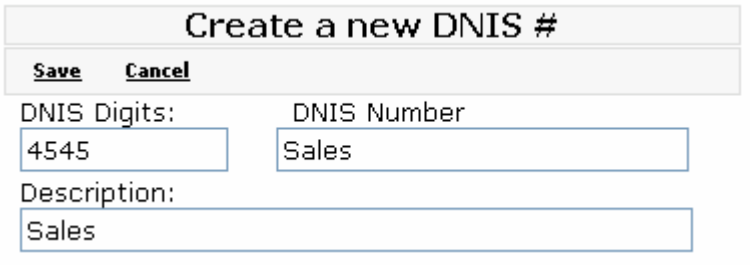
DNIS/DID

DNIS/DID Lists are used in the OAISYS Reporter and Web Replay. The DNIS numbers are used to populate the dropdown choices in the Ad Campaign section. DNIS Lists can be used to allow users to report on, view and listen to calls associated with a DNIS number or numbers.

Create a new DNIS #

Highlight a DNIS list from the tree view on the left. Expand the list to display the DNIS numbers.
Action

New



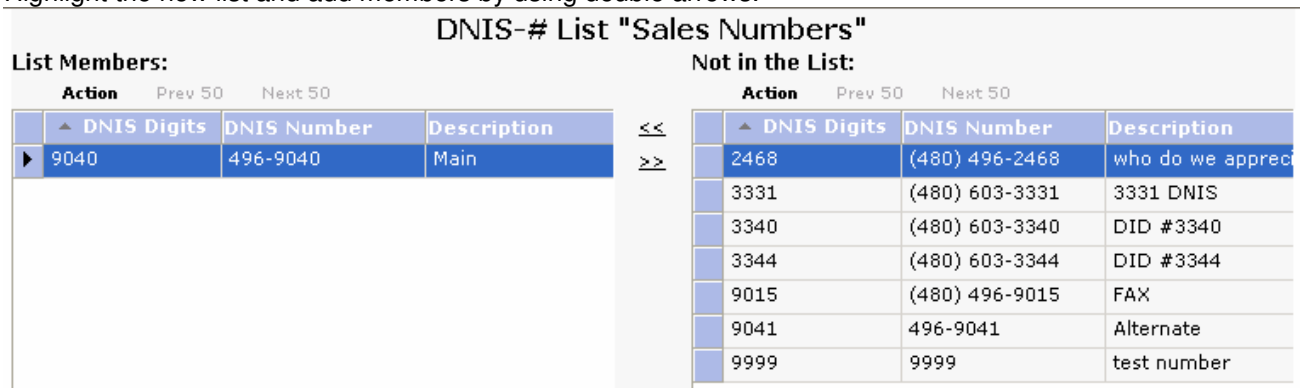
Create a New DNIS List

Highlight the DNIS List folder from the tree view.
Action

New

Description—Enter a name for your DNIS List.
Create a Call Filter for this List—automatically create a Call Filter consisting of DNIS #s on this list.

Highlight the new list and add members by using double arrows.



Extensions

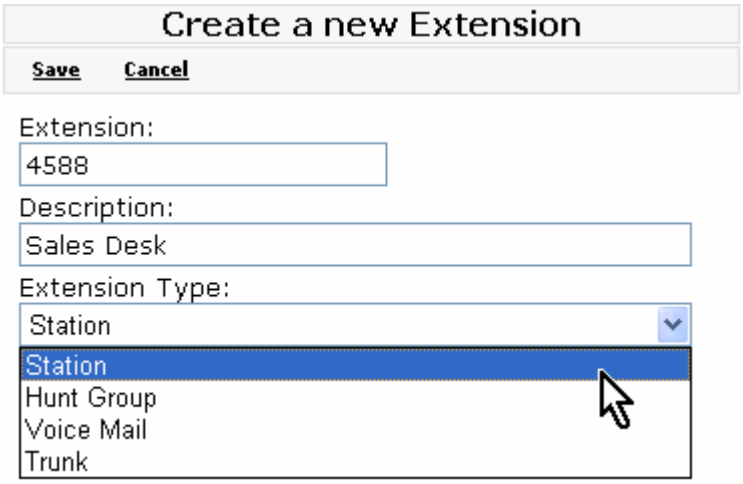
Extension Lists consist of one or more telephone extensions. The extension lists are used in the OAISYS Reporter and Web Replay to allow users to report on, view, and listen to calls that involve specific extensions. For example, a user may create an extension list called Sale Hunt Group. This list may include all of the extensions that are a member of that Hunt Group.
A call filter can automatically be created from an Extension List to make permission granting easier.
System Lists are identified with surrounding brackets. System lists can not be edited or deleted.

Create A New Extension

Highlight an extension list from the tree view on the left.

Action

New



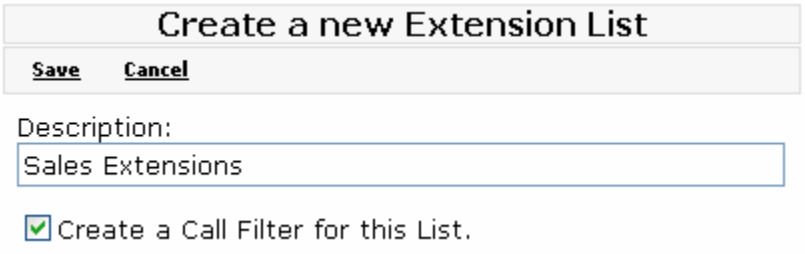
Extension—Enter the telephone extension number.
Description—Enter a description for the extension.
Extension Type—Select from Station, Hunt Group, Voice Mail, or Trunk to identify the extension.

Create an Extension List

Highlight the Extensions Folder from the tree view on the left.

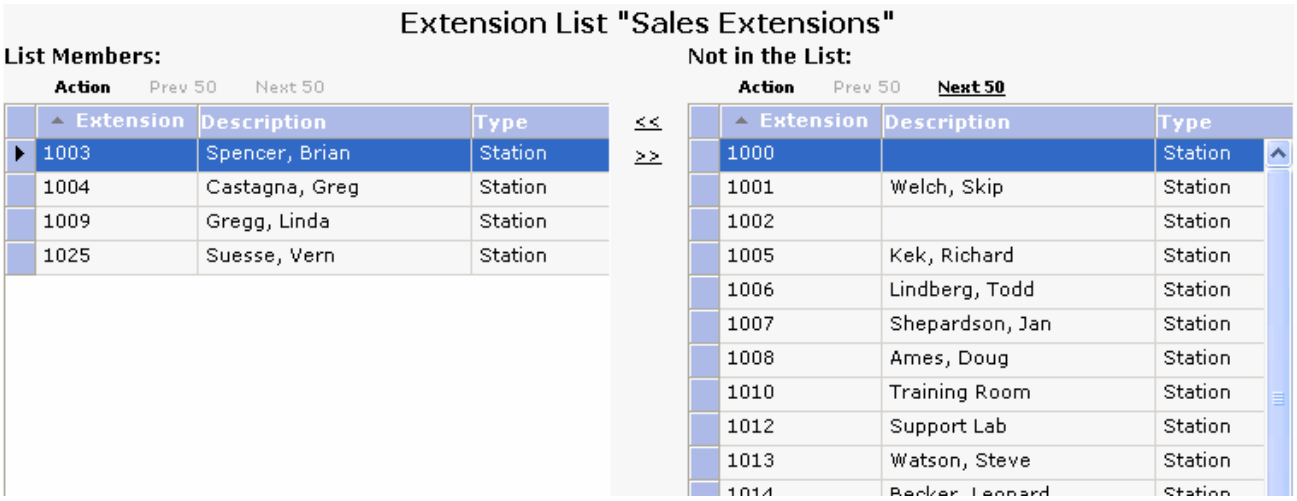
Action

New



Create a Call Filter for this List—automatically create a Call Filter consisting of extensions on this list.

Highlight the new Extension List on the left. Add and Remove members by using the double arrows.



Calls

Call Filters

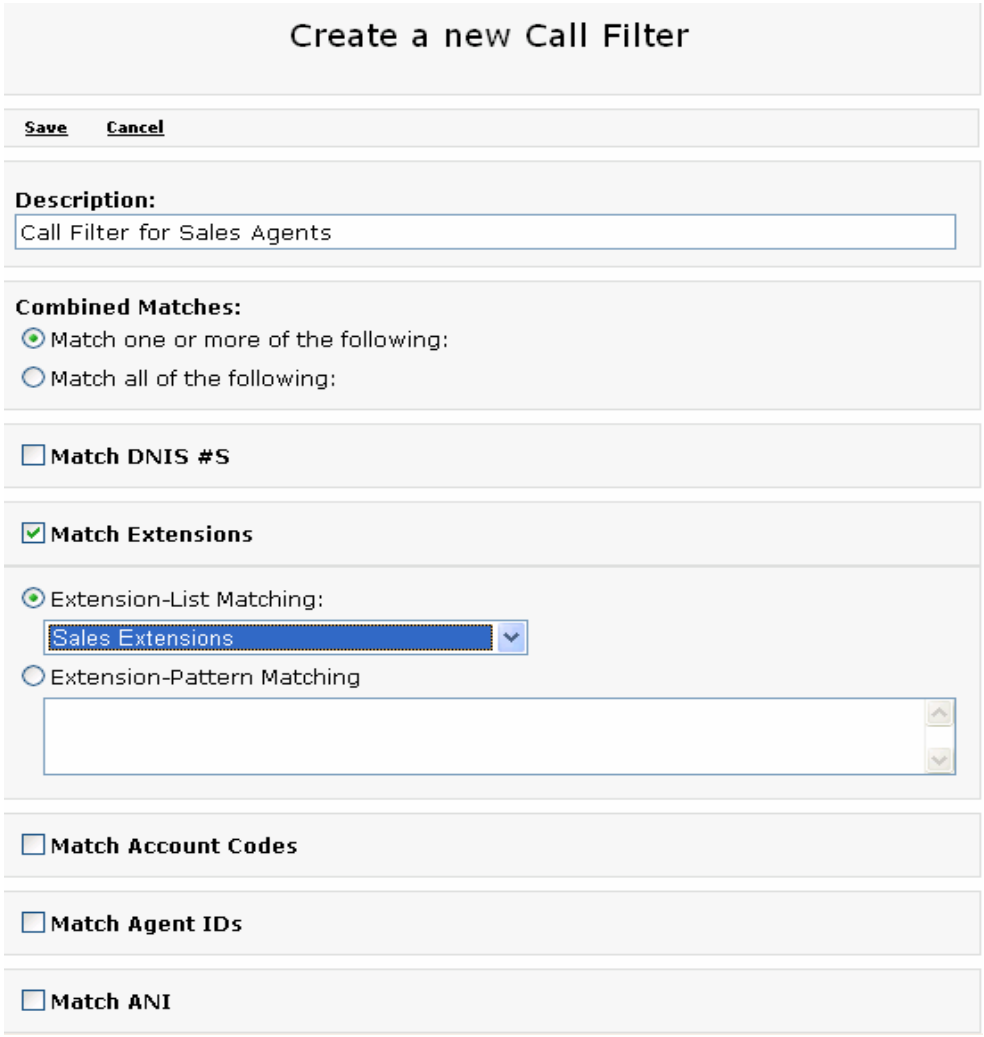
Call filters are used to make permission granting easier. Call Filters are created automatically by checking the Call Filter option when creating lists. Call Filters can be created, edited, copied, and deleted from the tree view.

Create a New Call Filter

Highlight the Call Filters folder from the tree view on the left.

Action

New



Description—Enter a name for the Call Filter.

Combined Matches—Select the appropriate radio button. If you'd like to match only *one* or more of the options then select the first radio button. If you'd like to call to match *all* of the options you select, use the bottom radio button.

Match DNIS#s—Create the Call Filter to match information about DNIS numbers.

Match Account Codes— Create the Call Filter to match information about account codes.

Match Agent IDs— Create the Call Filter to match information about Agent ID numbers.

Matching and Pattern Matching—Once an option to match is selected a drop down appears allowing you to chose from an existing list. You can also match a pattern. For example, if you'd like to match any account code that begins with 1 you will enter 1* in the account code pattern matching.

Call Data Fields

Call Data Fields are database fields for use in Web Replay. System Call Data Fields are indicated with brackets around the name. These fields can not be edited or deleted. Examples of System Call Data Fields are Start Date/Time and Duration. The data from these fields is displayed in Web Replay if a Call Column is identified to show the Call Data Field. See Call Columns for more information.

You can create new, edit, copy, or delete Call Data Fields.

Action

New

Create a New Call Data Field

Name—Enter a name for the Call Data Field.

Description—Enter a description for the Call Data Field.

Data Type—Select a call data type. The options are Text, Yes/No, Date/Time, Small Number, Large Number, Huge Number, or Tiny Number.

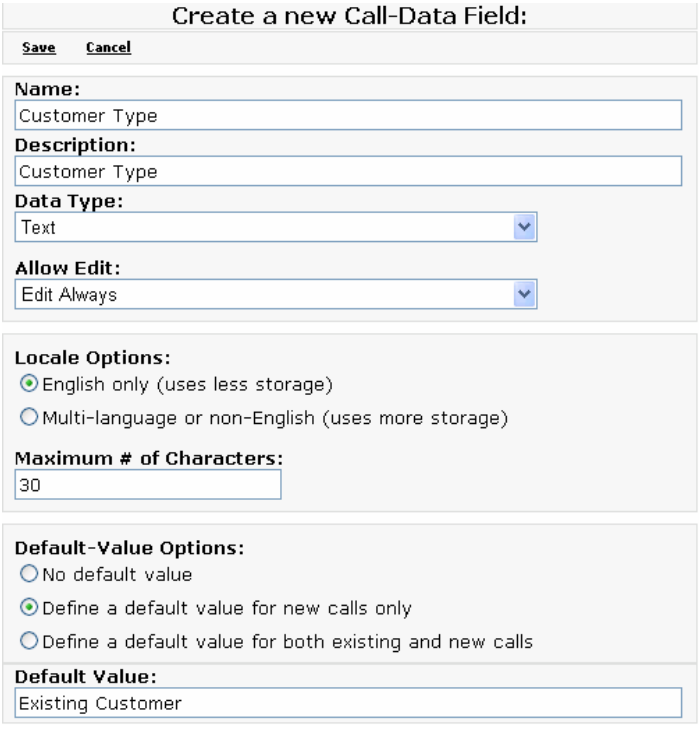
Allow Edit—Indicate whether or not you'd like to allow the Web Replay user the ability to edit the Call Data Field from Web Replay. Select from Never, Edit Once, or Edit Always.

Locale Options—Select English or Multi Language. Note—multi-language requires more storage space.

Maximum # of Characters—Enter the maximum number of characters the text field can be. Note—This is only available when the Call Data Field is a Text field.

Default Value Options—Indicate whether or not you'd like a default value set to the data field. You can apply the default value to no calls, new calls only, or new and existing calls.

Default Value—Enter the value for your Call Data Field.



Extra Call-Info Fields

Extra Call-Info Fields are used by Web Replay. The information in these fields is searchable criteria from Web Replay. Extra Call Info can be viewable information in Web Replay.

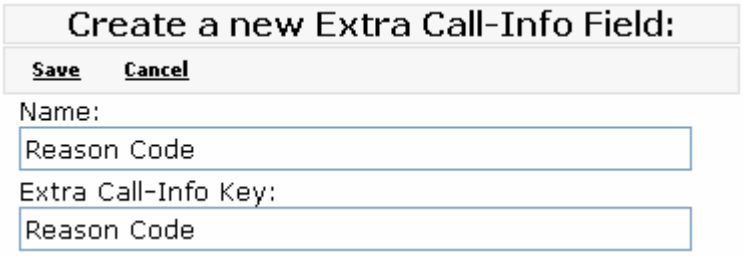
Action

New

Create a New Extra Call Info Field

Name—Enter the name for the Extra Call Info Field.

Extra Call-Info Key—Enter the Key, or Value for the Extra Call Info.



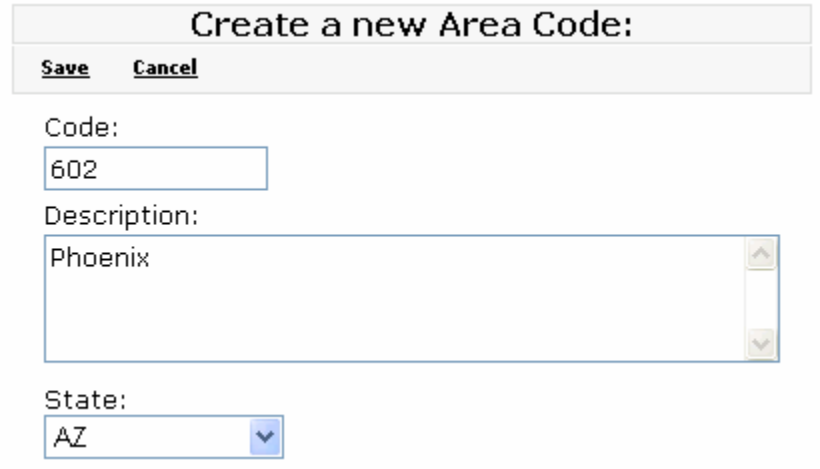
Area & Office Codes

Area Codes and Office Codes are used by the OAISYS Reporter to generate meaningful reports.

Enter a New Area Code

Action

New



Code—Enter the three digit Area Code.

Description—Enter a description for the area code.

State—Select a State from the drop down list.

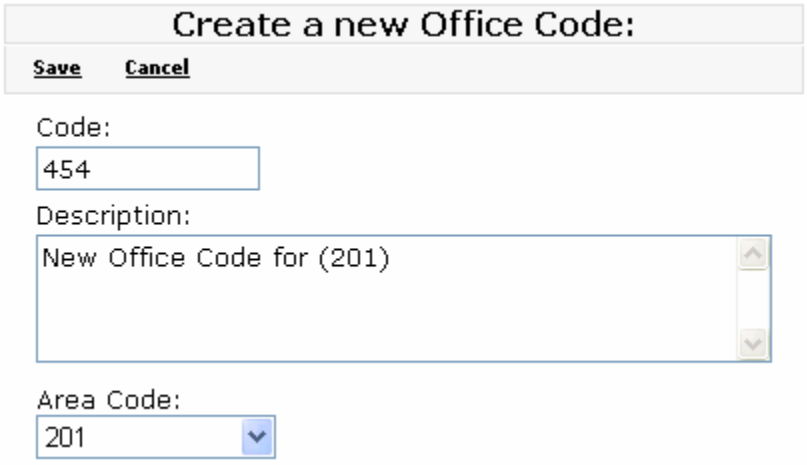
Click **Save** to save the new area code.

Enter a New Office Code

Select the area code from the drop down list.

Action

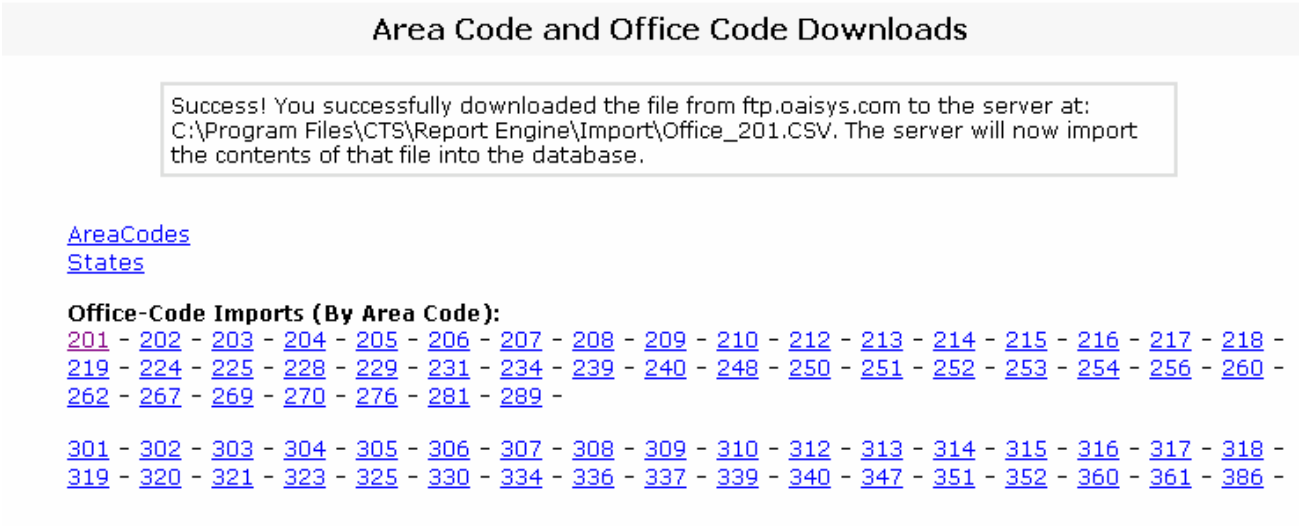
New



Click **Save** to save the new office code.

Downloads

Download a new area code and office code file from ftp.oaisys.com to your server.


Area Code and Office Code Downloads
Success! You successfully downloaded the file from ftp.oaisys.com to the server at: C:\Program Files\CTS\Report Engine\Import\Office_201.CSV. The server will now import the contents of that file into the database.
AreaCodes
States
Office-Code Imports (By Area Code):
201 - 202 - 203 - 204 - 205 - 206 - 207 - 208 - 209 - 210 - 212 - 213 - 214 - 215 - 216 - 217 - 218 - 219 - 224 - 225 - 228 - 229 - 231 - 234 - 239 - 240 - 248 - 250 - 251 - 252 - 253 - 254 - 256 - 260 - 262 - 267 - 269 - 270 - 276 - 281 - 289 -
301 - 302 - 303 - 304 - 305 - 306 - 307 - 308 - 309 - 310 - 312 - 313 - 314 - 315 - 316 - 317 - 318 - 319 - 320 - 321 - 323 - 325 - 330 - 334 - 336 - 337 - 339 - 340 - 347 - 351 - 352 - 360 - 361 - 386 -

My Locale

This is used to set your Local Area Code. The Local Area Code will by used by OAISYS Reporter.

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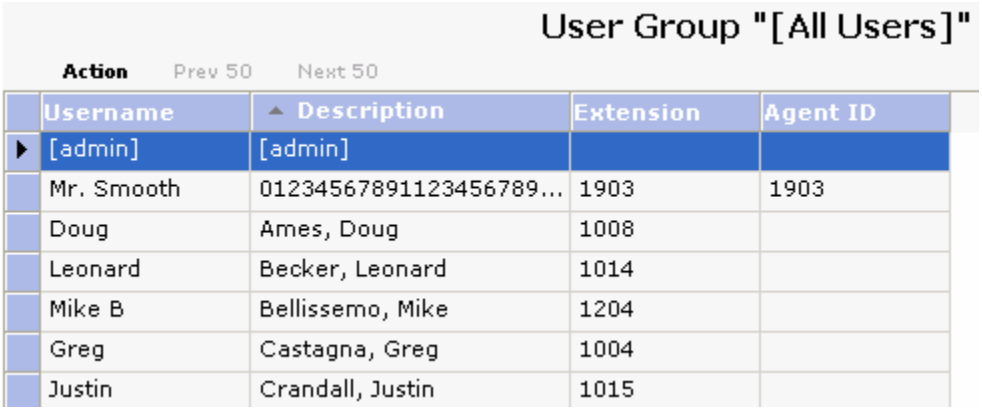
Users and Permissions

Users

A user is someone who has permissions to OAISYS web based Applications. For example, a user is someone who can run a report, evaluate an agent, or listen to a recording. A user can also be a member of a User Group in which case they inherit the permissions assigned to the User Group.

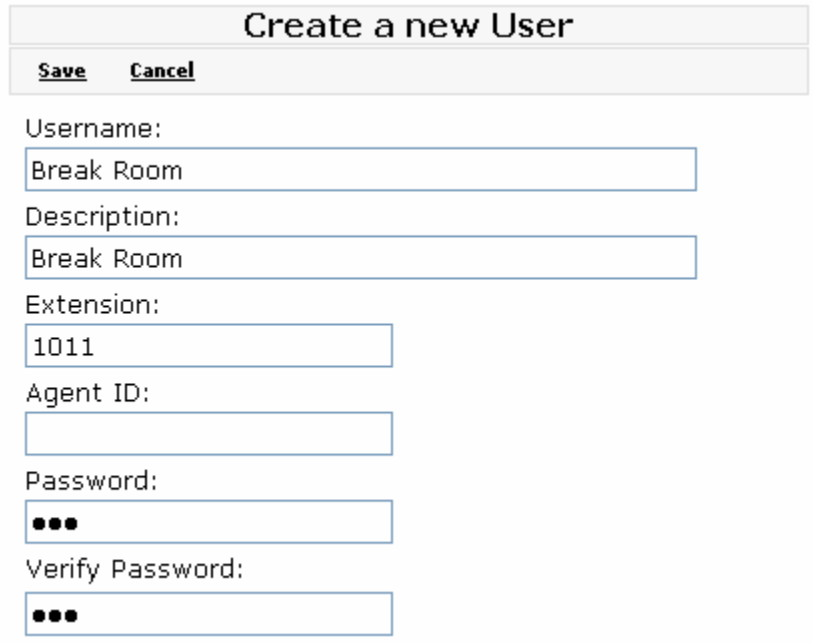
From the tree view, you can highlight the Users folder. Once you expand it you will see all current users. When you expand the individual user in the tree you will see the Applications Permissions folder and the User Groups folder. You can see which applications the user has permissions to and what groups the user is a member of.



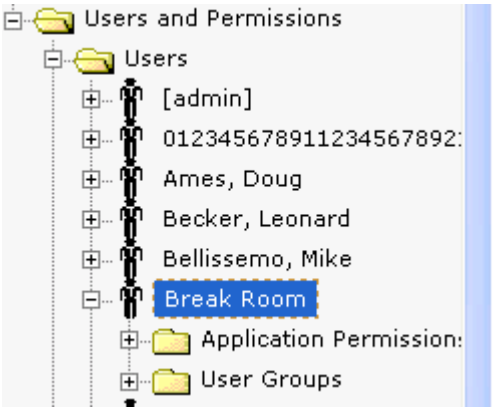
Create a New User

Action

New



Save
Application Permissions and User Groups are sub folders accessible from the User view. Application Permissions refer to the OAISYS Web Applications. For more information refer to the sections on Applications and User Groups.



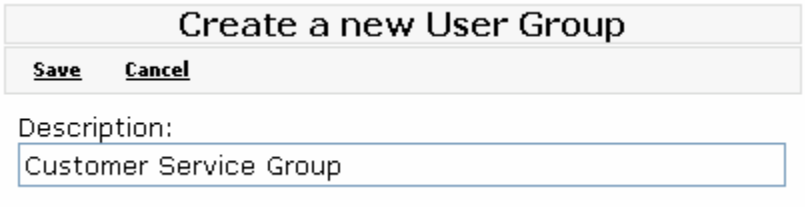
User Groups

User Groups let you specify a group of users that can perform specific actions within the OAISYS applications. By creating User Groups and assigning Applications Permissions to the User Group the users of the group automatically inherit the permissions of that group.

Create a New User Group

Action

New



Highlight the new User Group on the left pane. Move members to and from the group using the double arrows.

Application Permissions and User Groups are sub folders under a User Group. For more information refer to the sections on User Groups and Applications.

Applications

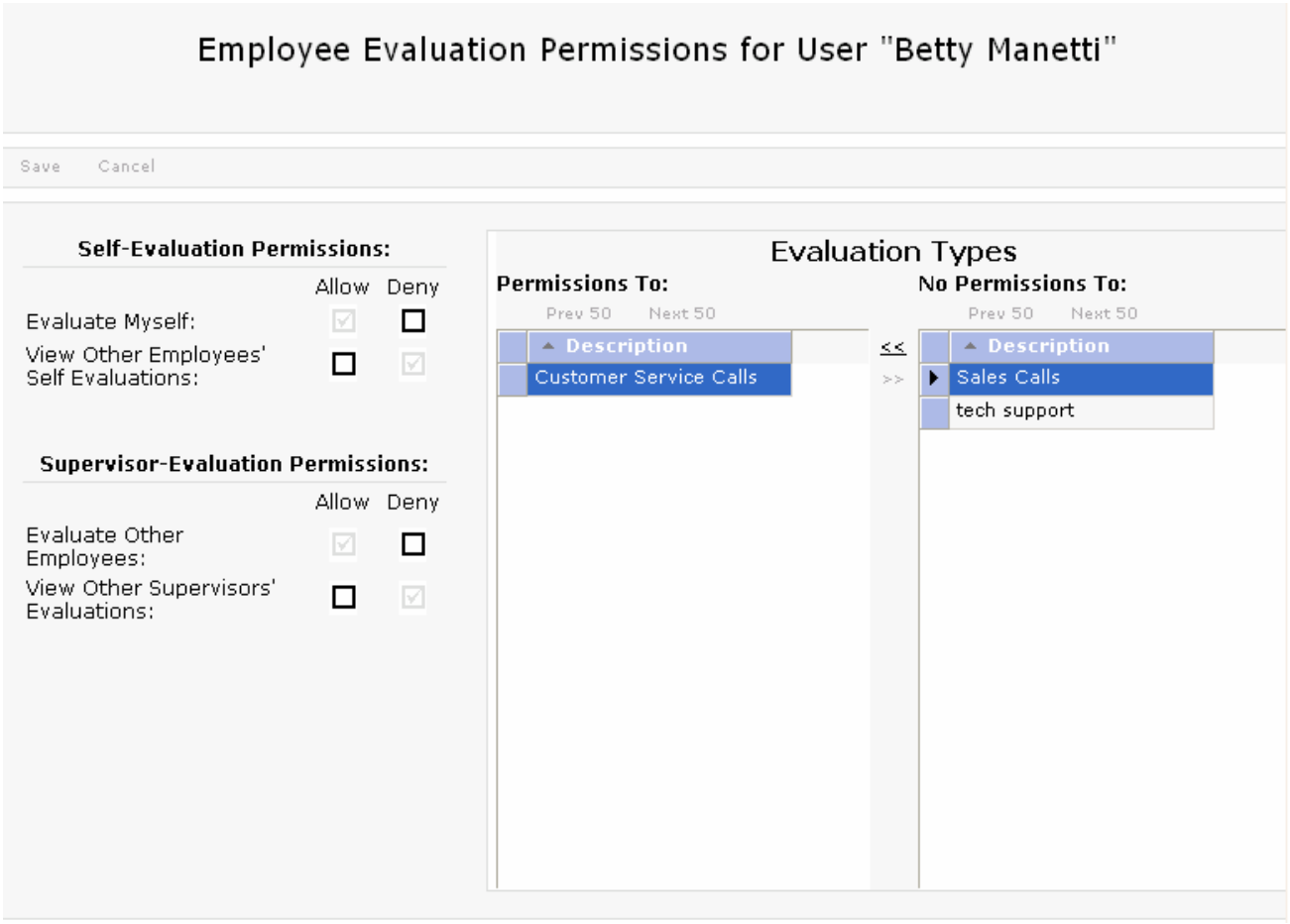
There are three OAISYS Web Based Applications in which the permissions can be set from the OAISYS Administrator. The permissions can be set at the User or User Group Level.

- **Employee Evaluation** – Users and User Groups have permission to Employee Evaluations. Expand the Employee Evaluation to view the Users and User Groups that currently have permissions to the application.

  Evaluation Types—Select the evaluations the User or User Group has permission to access by using the double arrows.

  Self-Evaluation Permissions—Enter a check mark in the box to Allow or Deny the User or User Group permission to Evaluate 'Myself' meaning them. Enter a check mark in the box to Allow or Deny the User or User Group permission to View the other employee's self evaluations. (A grey check mark in a permissions box indicates an inherited permission. This permission can be overwritten by an administrator by selecting another check box.)

  Supervisor-Evaluation Permissions—Enter a check mark in the box to Allow or Deny a User or User Group permission to Evaluate other employees and to view other supervisors' evaluations. (A grey check mark in a permissions box indicates an inherited permission. This permission can be overwritten by an administrator by selecting another check box.)



- **Reporter** – Users and User Groups may have permissions to the OAISYS Reporter. Expand the Reporter to view the Users and User Groups that currently have permissions to the application.

  Permissions to My Calls—Allow or deny users or user groups permissions to report on their own calls. (A grey check mark in a permissions box indicates an inherited permission. This permission can be overwritten by an administrator by selecting another check box.)

  Call Filters—Use the double arrows to move Call Filters to and from the calls that users or user groups have permission to report on.

  General Call-Permissions—Allow or deny user or user groups permission to the Call Filters selected. (A grey check mark in a permissions box indicates an inherited permission. This permission can be overwritten by an administrator by selecting another check box.)

- **Web Replay**-- Users and User Groups may have permissions to Web Replay. Expand Web Replay to view the Users and User Groups that currently have permissions to the application.

  Permissions to My Calls—Allow or deny users or user groups permissions to view call data, playback recordings, view and use bookmarks for their own recordings. Allow or deny user or user groups permission to modify call data and bookmarks in Web Replay. (A grey check mark in a permissions box indicates an inherited permission. This permission can be overwritten by an administrator by selecting another check box.)

  Call Filters—Use the double arrows to move Call Filters to and from the calls that users or user groups have permission to.

  General Call-Permissions—Allow or deny user or user groups permission to the Call Filters selected. Allow or deny permission to view call data, playback recordings, view and use bookmarks for the selected Call Filters. Allow or deny permission to modify call data and bookmarks in Web Replay for the selected Call Filters. (A grey check mark in a permissions box indicates an inherited permission. This permission can be overwritten by an administrator by selecting another check box.)